



VIRGIN ISLANDS HOUSING FINANCE AUTHORITY

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ADDENDUM NO. 2

Request for Proposals

Community Development Block Grant – Disaster Recovery Program

Housing Case Management Services and System

RFP-001-2019-DR-STT/STX

This addendum consists of Thirty-One (31) letter size pages (8.5' x 11").

Addendum No. 2 is hereby made part of the RFP for Housing Case Management Services and System, RFP-001-2019-DR-2019, dated January 24, 2019.

This addendum consists of Questions and Answers as follows:

1. Question – As a courtesy, would you accept a personal delivery of the submittal?

Answer: Yes. As noted on page 18, Section 15, proposals must be submitted by 4:00 p.m. AST on Monday, February 25, 2019.

2. Question – Would like a copy of the sign in sheet?

Answer: The sign-in sheet is attached hereto; and may be founded posted on VIHFA website at: www.vihfa.gov

3. Question – What are the required limits of insurance?

Answer: Refer to page 27 of the RFP.

4. Question – How many field officers are required?

Answer: Per page 26, VIHFA anticipates that there will be a minimum 1,500 applications and 500 applicants to grant award. Per page 23 of the RFP, provide your approach and methodology to serve the estimated applicants.

5. Question - What are the payment terms?

- a. Prompt Payment Discount
- b. Federal P/Payment

Answer: Payment discount and other payment terms will be negotiated. Respondent should indicate any preferred proposed payment terms in the approach and methodology per page 23.

6. Question – Approximately 1,500 potential applicants yet contract period of performance is two (2) years. If less applicants are there any intent to reduce bid/proposal amount?

Answer: Per Section 4.0 Term of Engagement, VIHFA anticipates the resulting contract will be a time and materials contract with a cap, therefore, fees will be based on actual time incurred.

7. Question – Are there any demographic done on each island?

Answer: Yes. Some hurricane demographics can be found within the Action Plan, as posted on www.vihfa.gov.

8. Question – Would there be a call in-center on St. John?

Answer: Respondent is to provide its best approach to the scope of services being requested.

9. Question – Is there going to be language interpreters for French creole?

Answer: Yes. VIHFA will be issuing a procurement for Spanish and French Creole interpreters.

10. Question – Please clarify if Construction Management is part of RFP?

Answer: No. Construction Management is not part of the RFP.

11. Question – Does VIHFA plan to own/use/operate the Case Management System beyond the life of the CDBG-DR grant?

Answer: Due to HUD specific guidelines, VIHFA is required to retain the data collected within the Case management database for a specific number of years. VIHFA would like the respondents to provide a brief summary on their preferred method/ process for either migrating or extracting the data stored within their systems in an acceptable format, prior to the end of the contract.

12. Question – Is there any entity that we need to register with?

Answer: Per page 10, Section 3.1, the successful bidder will be expected to obtain the required licenses and certifications to do business within the U.S. Virgin Islands.

13. Question – What license and/or certificate are required to do business in the USVI?

Answer: Kindly refer to page 10, Section 3.1.

14. Question – Can we get a sample of an in-take form?

Answer: A sample of the in-take form is posted to the VIHFA website at:
www.vihfa.gov

15. Question – Do we already have in-take centers?

Answer: No.

16. Question – Are the call centers executed by the 15 days requirements?

Answer: Per page 5, Section 2.2.2, the call centers are to be operational within 15 days.

17. **Question - Section 3.3 Minimum Technical Requirement – Case Management Software System – ELABORATE MORE**

- a. **xix. KPI Requirements**
- b. **xx. User Management Access**
- c. **xxxviii. Data Integration with GIS**

Answer:

- a. **xix. KPI Requirements** – The VIHFA requires that all respondent's Case Management System have the capability to create custom reports via their native report writer or allow backend connectivity to the database, so a 3rd party report writer can query the database for specific data.
- b. **xx. User Management Access** – The VIHFA expects the Case Management System to allow the creation of user accounts via the case portal for applicants. The Case Management System should also allow VIHFA MIS staff to create accounts for other individuals who will be utilizing the Case Management System for administrative tasks.
- c. **xxxviii. Data Integration with GIS** – The VIHFA is asking that all Respondents provide a summary on how GIS mapping capabilities can be integrated into their overall Case Management solution.

18. **Question – What is the expected date of questions response?**

Answer: Thursday, February 14, 2019

19. **Question – What caseload would be expected of the case worker?**

Answer: Per page 23 of the RFP, Respondent is to provide its best approach to the scope of services being requested that will provide optimal customer service.

20. **Question – Will the Case Management contractor or VIHFA be responsible for managing potential escrows?**

Answer: This is currently not included in the scope of services; however, VIHFA will encourage the respondents to provide any potential solutions for managing escrow accounts in the approach and methodology.

21. Question – Can we submit the proposal electronically?

Answer: No. Per page 18, Section 15.0, proposals must be submitted via mail, or hand delivered as per the response to Question #1.

22. Question – Are there any restrictions preventing one firm being proposed as a subcontractor to multiple different Prime Contractors?

Answer: Yes. A firm is not permitted to be a subcontractor to multiple different Prime Contractors.

23. Question – Can a Respondent submit a proposal as the Prime Contractor and also be included in a separate proposal as a subcontractor?

Answer: No.

24. Question – Are there any restrictions to the use of key staff in multiple separate proposals?

Answer: Yes. Identified key staff are expected to be solely engaged to this assignment.

25. Question – Does the Case Management System have to be fully operational and customized to VIHFA's requirements by the 15th day after contract signing or the 45th day after contract signing?

Answer: The Case Management System will have to be fully operational and customized 45 days after contract signing per Section 2.0.

26. Under what body or organization are the M/WBE to be certified?

Answer: Currently, the organization is the Virgin Islands Department of Public Works.

27. Question - Please clarify to what degree Community Outreach and Marketing are parts of the scope of this contract.

(There is no position on the Bid Sheet for Outreach and in I.iv.f, we see "Explain how related services (e.g. community outreach, construction management) will be performed by the Program and other partners; however, proposals should address a Respondent's anticipated approach and capability to coordinate with other providers.." **which would imply that outreach is not to be part of the scope. However, we are asked in I.vi to discuss how we would approach Outreach.)**

Answer: Yes, outreach and marketing will be a part of the scope of this contract. Outreach and marketing are expected to be conducted in conjunction with HFA. Outreach and marketing are noted as follows (this is not an exhaustive listing):

Pg. 8, Section 2.2.6 (xix)

Pg. 9, Section 2.2.6 (xxii)

Pg. 9, Section 2.2.7 (iii)

Pg. 9, Section 3.2 (xi)(k)

Pg. 14, Section (xxix)

Pg. 23, Section iv (c), (g)

28. Question – Please specify the type of background checks required.

Answer: As required on page 8, in Section 2.2.6 (ii), background checks of all staff is required. The normal employee background check comprising of criminal records, commercial records, and financial records of an individual.

29. Question – Please either provide goals or confirm this section refers to the goals as proposed by the offerors.

(Section 2.2.6, Required Task, sub xvii, states to “Provide a plan for Section 3 Compliance, Equal Employment Opportunity and Minority and Women Owned Business Enterprise (M/WBE) utilization”, and Section 10, M/WBE, specifically discusses the requirements. However, under Section 10, M/WBE, paragraph 2, refers to actions for not meeting the N/WBE Goals, yet no specific goals are provided for in the RFP.)

Answer: **Threshold:** For the Territory, Section 3 requirements are triggered for all contracts of \$100,000 and more. Note: The requirement is applicable regardless of the amount of federal dollars involved; Section 3 applies as long as the value of the total contract exceeds \$100,000.

Applicability: Housing rehab (including lead-based paint abatement); housing construction (i.e., HOME housing rehabilitation; new construction); demolition; other public construction (i.e., CDBG infrastructure; public facilities). Section 3 covered contracts include all building trades (carpentry, masonry, plumbing, electrical) and also professional services (architectural, engineering, legal, management and administrative support).

Numerical goals for employment and contracting:

- 30% of new full-time hires = 1 out of 3
- 10% of total dollar amount of contracts for building trades work
- 3% of total dollar amount of professional services contracts

30. Question – Please provide the amount of liquidated damages or the methodology that will be used for calculating these liquidated damages.

(Section 10, M/WBE, paragraph 2, refers to liquidated damages for not meeting the goals.)

Answer: In Section 10, the following language is stricken: “Willful and/or intentional violation of this obligation may result in the imposition of liquidated damages or other appropriate sanctions, including, without limitation, suspension of any future contracts with VIHFA and monetary payments based on the M/WBE goal shortfall.”

31. Question – Please provide the specific VIHFA terms or confirm that the terms provided are all that will be included in any subsequent awarded contract.

(Section 13, Standard Clauses for contracts with VIHFA, states Respondent shall certify that it will adhere to the terms and conditions set forth, and any subsequent changes deemed appropriate by VIHFA. However other than the HUD Provisions provided under Attachment 1, the specific VIHFA terms are not indicated.)

Answer: The specific VIHFA terms will be included in the awarded contract.

32. Question – Please confirm whether the Service Contract will apply to any awarded contract, as the Davis-Bacon Act under Article 21 will not apply to the Professional Services under the contract. If the SIF so please provide the applicable Service Contract Act Wage Determination.

(Attachment 1, HUD General Provisions, Article 20, Contract Work Hours and Safety Standards Act.)

Answer: As noted, the Davis-Bacon Act is not applicable to this contract. If there is any Service Contract Act Wage Determination that is applicable or becomes applicable, the contract will be amended to include any such Service Contract Act Wage Determination.

33. Question – To offer right staffing and since role descriptions on NEPA (short of simply ensuring Tier II reviews are completed and approved by VIHFA), DBRA and URA oversight/coordination, were not described within the scope of work Section 2.2 of the RFP, can VIHFA please confirm whether direct staffing for these functions will be required within the scope of this contract?

(Under Section 3.2 of the RFP – Required Qualifications: it indicates respondent must demonstrate capacity and prior experience for the following: NEPA, URA, and DBRA)

Answer: No, direct staffing will not be required for NEPA, URA and DBRA. VIHFA will be contracting out for these services.

34. Question – Will the Case Management contractor have a direct role with applicants after the grant agreement signing for any of the following items:

- a. Compliance monitoring (for occupancy, maintenance of flood insurance, affordable rentals, etc.)
- b. Draw requests
- c. Assistance with program processing steps particularly for those in homeowners selected contractor option, etc.?

Answer: Specifically, no but respondent may be part of communication with an applicant throughout the process. Respondent's active role is in beginning of the process in terms of in-take processing (application, eligibility determinations, preparing grant award notifications, etc) and during the process to ensure proper documentation of the homeowner's file. See pages 6 and 7 of the RFP, Section(s) 2.2.3.1; 2.2.3.2; 2.2.3.3; 2.2.3.4.

35. Question - Does the VIHFA have any requirements or suggested location criteria for the Intake and Call Centers or will that be the responsibility of the consultant to determine?

Answer: It will be the responsibility of the consultant to determine. VIHFA should have the right to approve the location.

36. Question - Based on the total reported damage to housing on the three islands, how many homes are still requiring substantial repair?

Answer: Information is based on applications to the STEP Program. Based on the latest report as of February 7, 2019, approximately 1,200 or less require substantial repair; however, there may be applicants that never applied to the STEP Program and may be first time applicants to the CDBG-DR program.

37. Question - Does VIHFA have a preference as to a particular web-based software package for managing the Case Management activities?

Answer: No, the VIHFA is not leaning towards any particular Web-based platform. The VIHFA is asking that all respondents provide granular details on how their proposed system will allow VIHFA staff to work efficiently and effectively in supporting the applicants. The VIHFA is aware that there are

several web-based platforms currently available in the marketplace by other CDBG-DR programs, so respondents will need to explain why their overall platform is superior over their competitors.

38. Question - Will VIHFA have a list of potential caseworkers that we can interview, or will they be identified through the consultant's use of local media and job advertisement platforms?

Answer: Potential caseworkers will be the responsibility of the consultant to identify. Respondent should provide details through its approach and methodology, and staffing plan.

39. Question - Will the selected software be used to manage other Housing programs in addition to the Homeowner R/R and the Rental R/R/programs?

Answer: Yes, the VIHFA plans on launching additional programs in the near future; however, the proposed Case Management System is not expected to support these additional programs.

40. Question - Can computer and office equipment be purchased on island through local vendors?

Answer: Yes, there are local vendors that sell computer and office equipment.

41. Question - Are transportation costs, including traveling between islands or meeting with applicants in their homes reimbursable?

Answer: Refer to page 5, Section 2.2.2, which requires Respondent to secure the necessary personnel, office space, computers, office furniture, telecommunications equipment and all other equipment/supplies necessary to operate an office on the island of St. Croix, St. Thomas and island of St. John. As per page 24, item p, as part of its approach and methodology, Respondent shall provide a strategy for integration of assistance to applicants by phone, online and in-person. Pricing is to be proposed per the requirement of Enclosure Document E.

42. Question - Can you elaborate on the extent of outreach and marketing efforts that will be required by the consultant under this contract?

Answer: See response to Question No. 27.

43. Question - Who will be responsible for housing related pre-construction services including damage assessments, construction inspections, survey and environmental reviews?

Answer: Documentation pertaining to damage assessments, construction inspections, survey and environmental reviews is expected to be housed within the Case Management System. However, work associated with these items are not part of this contract.

44. Question - During the pre-proposal conference, you mentioned that you will post a conflict of interest form to be completed and submitted with the proposals. Can you please confirm when that form will be posted?

Answer: During the pre-proposal conference, an additional conflict of interest language was going to be added to the RFP. See Addendum #1, Bullet Number 3, for the additional conflict of interest provision. Addendum #1 can be found posted on the VIHFA's website.

45. Question: Would VIHFA consider it a conflict if a vendor is currently working on other contracts with the V.I. Government?

Answer: VIHFA will review all potential conflict of interest as part of the bid evaluations.

46. Question - Based on your expected date for posting responses to bidder questions and the final proposal due date, bidders will have only a few days to finalize and modify proposals to address any clarifications. Would you accept proposals on the due date via Email with a follow-up of the hard copy 1 week after? Or would you consider extending the due date by 1 week?

Answer: Proposals will not be accepted by email nor will the due date be extended by 1 week.

47. Question - If a vendor has significant experience with either the case management system or the case management services, would the VIHFA consider awarding one vendor the system and another vendor the services?

Answer: Yes. See Section 2.3.

48. Question - Within the Scope of Work, section 2.2.2. Start-up of Operations, please define "part-time" regarding the case management office on the Island of St. John.

Answer: "Part-time" is defined as working less than the customary or standard hours. In meeting the requirements of this RFP, Respondent should provide its proposed methodology and approach to have sufficient staff/supplies to support a part-time case management office on the island of St. John.

49. Question - Within the Context section 1.1, are the "program-specific administrative portals" separate from the case management system required to be provided by the proposer?

Answer: No, the administrative portals should be native to the proposed Case Management System. The VIHFA MIS staff is asking for administrative rights to be able to create staff accounts and provide minimum MIS services, such as password resets and assignment of privileges. If the respondent has any restrictions regarding this, please be sure to provide the details on your individual approach. Respondents should also be aware that the Case Management Services should include details on how they plan on administering the applicant's staff. It is not the intent that the VIHFA MIS team will be providing MIS services to the applicants, this should be the direct responsibility of the Case Management team.

50. Question - What are the desired operating hours of each intake center and the call center?

(Section 2.2.3 Case Management Staffing Services)

Answer: In meeting the requirements of this RFP, Respondent should provide its proposed methodology and approach on what will be deemed desired / desirable hours of operation for each intake center and call center. As per page 6, Section 2.2.3, "Respondent should anticipate that personnel will work a maximum of 40 hours per week, possibly on staggered schedules, which will include weekends, to complete the assigned tasks."

51. Question – Please clarify the anticipated role of the Housing and Case Management Subject Matter Expert identified in Scope of Work?

Answer: In meeting the requirements of this RFP, Respondent should provide its proposed methodology and approach on the role of the Housing and Case Management Subject Matter Expert, if needed, under its proposed level of operations.

52. Question – Can a bid package be delivered in person to the VIHFA address instead of by mail?

Answer: Yes, the package can be delivered in person. See also the response to Question #1.

53. Question – Will the selected recipient be given access to the data from the existing Case Management system used for the emergency repairs and roofing programs?

Answer: Respondents should be clear in their response, how they intend on importing existing data into their Case Management System. This topic can be discussed in greater detail, once the vendor selection has been narrowed down.

54. Question – Page 9, Action Plan (July 10, 2018). The STEP program is completing an entire scope of work for every home it enters. What is the format for these scopes of work, and will they be available for the permanent repair program? Are these detailed damage estimates performed in a standard estimating software like Xactimate?

Answer: For every home in the STEP Program and extensive inspection was conducted with the intent of generating a scope of work. This damage was assessed and recorded into an automated data collection and management system which was used to generate the scope of work from a Unit Pricing Guide developed specifically for the program. Xactimate was not used.

55. Question – How is the 50% damage threshold determined? Does the existing SOW's have both reconstruction and rehabilitation estimates based on storm damage? Is market value used in the calculation of % damage?

Answer: The Homeowner Reconstruction and Rehabilitation Policies and Procedures Version 1.0, posted on VIHFA's website (www.vihfa.gov), Substantial Damage is defined as: Damage of any origin sustained by a structure whereby the cost of restoring the structure to its pre-damaged condition would equal or exceed 50 percent of the market value of the structure before the damage occurred (44 CFR 59.1).

56. Question – Is there a separate procurement for damage assessment and appraisal services?

Answer: Yes, there is a separate procurement for damage assessment and appraisal services.

57. Question – Were environmental reviews completed for the homes in the STEP and/or roof programs? Will environmental reviews be required of the vendor for Case Management? (Damage assessments must take into account environment costs as part of grant ward calculations.)

Answer: Environmental reviews have been, or will be, completed as necessary.

58. Question – A total of 200-500 homeowners are expected to be served in the Homeowner Rehab/ Recon program, with many more applications expected. Is there only enough funding for 200-500 homeowners to be served, or are a significant number of applications expected from homeowners who will not qualify for the program?

Answer: We are working with funding as approved in Tranche 1.

59. Question – Is there a max grant for each homeowner?

Answer: Under the Reconstruction program, the maximum grant for each homeowner is \$250,000; under the Rehabilitation program, the maximum grant for each homeowner is \$25,000.

60. Question – Have the program policies for either the Homeowner or the Rental programs been completed?

Answer: The Housing Reconstruction and Rehabilitation program draft policy is posted currently on www.vihfa.gov.

61. Question – Has the VIHFA negotiated a waiver on the use of total assets as part of the low-to-moderate income determinations?

Answer: No, VIHFA uses the IRS 1040 definition of income.

62. Question – How does the VIHFA intent to manage constructions where owner financial responsibility is required to complete the construction? Will escrow accounts be needed? If so, who will establish and manage those? Will this insurance money be required to be put into escrow before construction begins?

Answer: If an owner has financial responsibility in completing the construction, the funds will have to be verified and placed in an escrow account to be available prior to the construction. It is anticipated that insurance funds will also be placed into escrow before construction begins. See the response to Question #20 for further guidance as to the establishment and management of escrow accounts.

63. Question – For managed constructions, how many draws does the VIHFA anticipate for each rehabilitation and reconstruction? Will the Case Management Services contractor be required to perform inspections to evaluate whether the proper amount of work is completed before approving the draws?

Answer: The number of anticipated draws for both rehabilitation and reconstruction is three (3) draws. The Case Management Services will not be required to perform inspections.

64. Question – Will homeowners be allowed to choose their own construction contractors, or will they be required to use program contractors? Will homeowners be allowed to repair their own homes?

Answer: Given some parameters, the Housing program does permit Homeowners to choose their own contractor (upon being vetted with VIHFA), use program contractors and/or repair their own homes.

65. Question – Is there an estimate on the number of rental properties expected to participate in the Rental Rehab/Recon program?

Answer: No, currently there is no estimate of the expected number of rental properties that will participate in the Rental Rehabilitation / Reconstruction program.

66. Question – Will mitigation/resiliency be part of the Homeowner and Rental programs, or will it be a program on its own?

Answer: Yes.

67. Question – What is the format of the receipts for prior work completed? Will the receipts be in the form of a single amount spent on the STEP and/or roofing programs? Or will it be a detailed listing of all work completed?

Answer: Consultant should provide its approach and methodology on handling all of duplication of benefits.

68. Question – Will the VIHFA consider a reimbursement program for homeowners who have completed their repairs and paid out of pocket?

Answer: Currently, a reimbursement program for homeowners is not available under this program.

69. Question – There may be on-going Other Direct Costs (ODCs) associated with running the programs, such as building leases, office supplies, leased office furniture, leased printers/copiers, travel for field-based personnel (including special needs assistance),

software support costs, security services, website hosting, etc. Should respondents sum these costs for the two-year period and submit as “start-up” costs? Will the successful respondent be allowed to submit multiple invoices for “start-up” costs?

Answer: Consultant should provide proposed pricing per Section 2.2.2 and per the requirements of Enclosure Document E; the “Bid Sheet”.

70. Question – Page 11, xi.b. The RFP request familiarity with uncapped income limits for LMI determinations. Generally, uncapped calculations are only different in areas with very high AMI’s. Has HUD granted an exception to the Virgin Islands to use uncapped income limits?

Answer: No.

71. Question – Is the local hosted component an absolute requirement for the Case Management software? Does VIHFA’s St. Thomas location have a secure server room, with adequate cooling, redundant power sources, as required in commercial hosting facilities? Will the VIHFA provide power, 7x24 access, and physical security for the servers, disk arrays, and associated hardware?

Answer: It is solely up to the respondents to provide their approach on how they intend on ensuring the VIHFA operations will not be affected in the event of a catastrophic event. The local component is a requirement of the VIHFA MIS department, due to the downtime experienced after Hurricane’s Irma and Maria in 2017. The VIHFA would like to be able to continue serving residents in the territory, should there be another catastrophic event in the territory. The VIHFA is also researching additional solutions, such as internet satellite uplinks, which may ease the hard requirement of providing a hybrid solution. All respondents should provide their individual approach on disaster recovery options for the VIHFA.

72. Question - Page 13, vii. The Case Management software should integrate with the VIHFA Financial Software and Grant Management software. What is the financial software package used by the VIHFA? Is there a separate Grant Management software used by the VIHFA?

Answer: Currently, the VIHFA is utilizing SAP as their Financial Management System. The VIHFA will be releasing an RFP in the near future for the purchase of a Grant Management System.

73. Question - Page 13, xiii. Is it the intention of the VIHFA to make GUI modifications, or have a support contract with the vendor to make any needed modifications?

Answer: The VIHFA is open to the notion of making small changes to the Case Management System and is expecting all respondents to provide details as to whether this is possible based on the specific platform being proposed. The VIHFA is expecting the respondents to also provide the necessary training to the VIHFA MIS staff, if this is easily achieved.

74. Question - Page 13, xv. The RFP request for the Case Management interface to allow language selection (English/Spanish). Will policy allow for supporting documents to be in Spanish as well, along with grant agreements, right of entry forms, final agreements, etc.? Or will all supporting documents be in English?

Answer: As the predominant language in the U.S. Virgin Islands is English and all business transactions and documentation are conducted using English, all supporting documentation are most likely to be in English. However, all program documents generated by the CDBG-DR Housing program will be available in English, Spanish and French Creole.

75. Question - Section 2.2.3.3 - What is the extent of the case management provider's obligation to verify that environmental Tier II review and Historic Preservation documentation "has been completed and approved by VIHFA"? Does this simply mean the case management provider must ensure the documentation is included in the file with appropriate approval indicated or does it mean the case management provider must ensure it is complete and accurate?

Answer: The Case Management provider must ensure the documentation is included in the file with the indicated appropriate approval(s).

76. Question - Who is performing the environmental Tier II review and preparing Historic Preservation documentation?

Answer: Those services will be procured by the VIHFA.

77. Question - Section 2.2.2 - Can the call center be located offsite, or must it be physically located on the island?

Answer: Call center can be located offsite.

78. Question - Section 2.2.2 - The RFP mentions one permanent case management office and one part-time case management office. How long does VIHFA anticipate these offices to remain open?

Answer: The initial term of the contract will be for a two (2) year period.

79. Question - Section 2.2.6(x) - What are the types and quantities of “existing paper file documentation”?

Answer: Information from the STEP program.

80. Question - Section 16(G) - Does VIHFA intend for respondents to provide copies of “degrees, licenses, certifications” or just indicate which are possessed and in good standing by the issuing entity for each key personnel?

Answer: Yes, supporting documentation that shows good standing and any certifications, licenses should be included.

81. Question - Section 15 & Section 16(H) - Section 15 states that responses must follow the form and order described in Section 16. Section 16 notes that Proposal Content Section H is reserved for Pending Litigation Notifications but indicates it should be included in the Executive Summary at Proposal Content Section B. Do we include this information in both spots or only in the Executive Summary and leave Proposal Content Section H of the response blank?

Answer: This information should be included in the Executive Summary and any details outlined in Proposal Content Section H of the response.

82. Question - The Non-Collusive Affidavit (Enclosure Document A) states "Subscribed and sworn to before me on the Island of _____". Does this mean that the notary must be based on the island or can any properly accredited notary public attest to the signature?

Answer: Any properly accredited notary public can attest to the signature.

83. Question - What is the best resource to identify certified M/WBE firms located within the Virgin Islands?

Answer: See the response to Question #26.

84. Question - Page 22 states any subcontractor must have agreed in writing to be included in the respondent's proposal and any written agreements with those subcontractors must be produced to VIHFA upon request. To confirm, the written acknowledgement and any related agreements are not required to be included in the response, rather simply available upon request?

Answer: Correct, the written acknowledgement and any related documents are not required to be included in the response but must be available upon request.

85. Question - Please clarify if rates are to include travel, housing, and per diem.

(Note: Section 2.1 of the RFP (page 3) reads: "The initial Case Management Services will focus on the Reconstruction solution within the Homeowner Rehabilitation and Reconstruction. This first phase of the program is expected to serve approximately 200 to 500 homeowners. However, the number of homeowners that submit applications to the program could be far greater. The Case Management Services will also support application services and support to landlords in the Rental Rehabilitation and Reconstruction program." Sub-Envelope 2 A.i. (page 26) reads: "Budget - Please provide a budget which includes the anticipated staffing costs per 1,500 applications received and 500 applicants to grant award...")

Answer: Pricing shall be submitted per the requirements of Enclosure Document E Bid Sheet. Hourly rates should not be inclusive of travel, housing, and per diems as there is a separate item for these proposed costs.

86. Question - Please confirm number of applicants received and awarded for pricing.

Answer: This program has not launched yet; thus, no applications have been received. See response to Question # 36.

87. Question - Please confirm the number of landlords we should be expected to serve in this program for accurate pricing.

(Note: Section 2.1.2 of the RFP (page 4) describes the Rental Rehabilitation and Reconstruction program.)

Answer: VIHFA cannot confirm the number of anticipated landlords to be serve within the program.

88. Question - This contract is not construction and is Professional Program Management/Consulting. Can the Davis Bacon Wage requirement be taken out of the RFP? Under DBA, contractors would be required to submit certified payroll along with our subcontractors each month. The report would result in a \$0.00 report each month.

(Note: In Attachment 1: HUD General Provisions: 21. DAVIS-BACON ACT description reads: "(Applicable to construction contracts exceeding \$2,000 when required by Federal program legislation)."

Answer: Correct. However, Attachment 1: HUD General Provisions is a generalized list of additional contractual provisions that are required to be part of all CDBG-DR contracts; whether singularly applicable or not.

89. Question - This contract is not construction and is Professional Program Management/Consulting. Will the three listed bonds be required?

(Note: In Attachment 1: HUD General Provisions: 29. BONDING REQUIREMENTS description reads: "(Applicable to construction and facility improvement contracts exceeding \$100,000)."

Answer: See the response to Question No. 88.

90. Question - Enclosure Document E (Bid Sheet) – What does "Estimated Timing" mean? What does the "100" represent? How does the "Estimated Timing" value factor in the calculation of the "Estimated Total"?

Answer: See the response to Question No. 117.

91. Question - Section 2.1 states the first phase is expected to serve 200 to 500 homeowners with the understanding that a far greater number of applications will be processed to assist those 200-500. It further states that these case management services will also support application services and support to landlords in the Rental Rehabilitation and Reconstruction program. For purposes of estimating the "hours per week" to calculate the estimated total price on the Enclosure Document E (Bid Sheet), is the respondent to only consider the 200-500 projected applicants served as indicated in Section 2.1? Should we assume service to enough applicants to obligate the entire or assume these case management services will be provided to enough applicants to obligate the entire \$60,000,000 allocated to the Homeowner Rehabilitation and Reconstruction Program? How should the \$25,000,000 allocated to the Rental Rehabilitation and Reconstruction Program be considered in our pricing efforts.

Answer: The Respondent should consider approximately 1,500 homeowner applications for program eligibility; and 200 to 500 applicants being deemed eligible and moving through the process. Assume the case management services to be provided to obligate the entire \$60,000,000 allocated to the Homeowner Rehabilitation and Reconstruction Program. Assume the case management services to be provided to obligate the entire \$25,000,000 allocated to the Rental Rehabilitation and Reconstruction Program.

92. Question - Given the possibility of a broad interpretation amongst the prospective respondents of the extent of services to be provided (i.e., the only range of served applicants provided is 200-500 for the Homeowner Rehabilitation and Reconstruction Program only), would the VIHFA consider providing a total estimated applicants to be

served under the programs covered by this RFP so ensure consistency in evaluation of respondents estimated level of effort and resulting overall price?

Answer: See the response to Question #91.

93. Question - How many total applications does the VIHFA anticipate processing for each program covered by this RFP?

Answer: See the response to Question #91.

94. Question - How many total applicants does the VIHFA anticipate ultimately being served for each program covered by this RFP?

Answer: See the response to Question #91.

95. Question - For pricing purposes, how many applications processed or applicants served does the VIHFA desire the respondents assume when calculating its total cost on Enclosure Document E (Bid Sheet)?

Answer: See the response to Question #91.

96. Question – What agency has the right and responsibility to issue regulations and oversee USVI agency and authority contracting responsibilities in regard to Equal Employment Opportunities and Minority and Women-owned Business participation?

Answer: See the response to Question #26.

97. Question – Who is the certifying entity for the USVI and who has control or involvement in the certification process?

Answer: See the response to Question #26.

98. Question – Section 2 of the Request for Proposal (RFP) indicates that the respondent may tasked with providing case management services for other housing related programs. Can

the Virgin Islands Housing Finance Authority (VIHFA) identify the other housing programs? Can VIHFA indicate whether the case management system in Section 3.0 of the RFP will require modification to accommodate the requirements of these other housing programs?

Answer: Currently, the Case Management Services will only cover the Homeowner Reconstruction and Rehabilitation Program and the Landlord Reconstruction and Rehabilitation Program.

99. Question – Section 2.1 indicates that the first phase of the program is expected to serve 200-500 homeowners. Does the VIHFA intend to utilize KPIs from the proposed case management system to identify first phase program recipients? If not, will the Respondent be responsible for selection of these recipients?

Answer: VIHFA will provide the criteria for first phase program requirements to the awarded contractor. The contractor will be expected to use the criteria provided as part of the case management services. All final approval determinations of recipients will be made by VIHFA.

100. Question – Section 2.2.2.: Can the Respondent utilize the St. Thomas office to provide case management services to St. John or is a part-time office mandatory?

Answer: In meeting the requirements of this RFP, Respondent should provide its proposed methodology and approach to have sufficient staff/supplies to support a part-time case management office on the island of St. John.

101. Question – Section 2.2.4 states that VIHFA reserves the right to request that respondent utilize a different software solution/platform. Does VIHFA have a desired case management platform that they have utilized? If so, can VIHFA provide the information (supplier, contact info) for that platform?

Answer: No, VIHFA does not have a preferred platform, but we do reserve the right to choose a Case Management System, which meets and exceeds the specific requirements highlighted in the Case Management RFP. The VIHFA would like to kindly remind the respondents to highlight the features and capabilities of their overall Case Management solution in their proposals.

102. Question – Section 2.2.5 requires creation of a website to provide housing program information. Can VIHFA specify what “other website and reporting services” will be requested?

Answer: The VIHFA will be releasing an RFP relative to the design/ build of a CDBG-DR website. It is anticipated the disaster recovery website will utilize a platform to allow some level of integration with other web-based systems. The disaster recovery website RFP will highlight specific requirements, so the respondents are aware of how the website will need to interact with the Case, Grant, and Financial Management Systems.

103. Question – Section 2.3: Does Contract award require HUD approval?

Answer: No.

104. Question – Section 3.3 is the Respondent required to provide a physical server for replication of the data that is hosted in the cloud, or will that data be hosted on an existing VIHFA server?

Answer: The VIHFA will procure a physical server based on recommendations from the chosen respondent.

105. Question – Section 3.3.vii: Can VIHFA provide the software information that is used for its Financial Management Software and its Grant Management System can be integrated into these platforms?

Answer: The VIHFA will be utilizing SAP Business Edition for its Financial Management System. The VIHFA cannot provide the name of the Grants Management System because we are currently finalizing the Grants Management System RFP, which is slated to be released in the near future.

106. Question – Section 3.3.xix: Can the VIHFA provide the Key Performance indicators (KPIs) that must be included in the case management reporting functionality?

Answer: See response to Question 17(a). Additionally, upon contractual award, more detailed discussion will occur with the successful Respondent.

107. Question – Section 10.0: Is the VIHFA receptive to a M/WBE led team that has one or more CDBG-DR projects or will M/WBEs be relegated solely to a sub-consulting relationship with the legacy firms? Our experience is that “good faith efforts” from legacy firms is not easily verifiable and is often not achieved. Please advise.

Answer: Per Section 3.0, VIHFA is seeking a firm with substantial experience and success in Disaster Recovery Housing Case Management and Related Services. The selected respondent must be able to adequately demonstrate their experience standing up and facilitating a CDBG-DR Housing Case Management Program in its proposal submittal. VIHFA desires that the firm’s resources meet or exceed criteria listed in Part 2: Scope of Work and Part 3: the Scope of Work and Qualifications.

108. Question – Section 2.0: The RFP states, “Coordination with the appropriate entities to sure the timely construction of work and administer the funding made available for the benefit of property owners.” Are there any consultation requirements regarding Damage Assessments/Construction Solutions required in this RFP?

Answer: There are no consultation requirements regarding damage assessments / Construction Solutions.

109. Question – Section 2.2.1: The RFP states, “Assume control and responsibility of current programming and procedures.” What is the current programming and procedures to be turned over with this RFP?

Answer: A draft of the Homeowner Reconstruction and Rehabilitation policies are posted on VIHFA’s website. Respondent is expected to perform the activities as outlined on page 6, Section 2.2.3.1, 2.2.3.2, 2.2.3.3, and 2.2.3.4.

110. Question – Section 2.2.3.3: The RFP states, “Based on the sources and uses analysis and contract estimates provided by the construction supervisor...” How will damage assessments and damage repair verifications be conducted? Will an estimating software be used?

Answer: No.

111. Question – Section 6.0: The RFP states, “The documentation of the prime contractor is also required of the subcontractor.” Does this documentation need to be submitted with the proposal or after contract award?

Answer: Respondent’s should follow the requirements of Section 16.0 for submission of its proposal. Additional information for subcontractors may be requested by VIHFA prior to any contract award.

112. Question – Section 1.1: The RFP states, “Through program-specific administrative portals, VIHFA staff (“VIHFA Program team) will require the functionality to view and manage individual applications, grant determinations, and other program milestones, as well as export aggregated data for program metric and reporting.” Is this functionality required in the case management system?

Answer: If this functionality is available in your overall solution, the VIHFA is asking that all respondents provide specific details on how this can be achieved. It is the VIHFA’s intent to integrate/ interface all systems as best as possible to allow for seamless inter-communications/ reporting.

113. Question – Section 1.1: The RFP states, VIHFA program team will work with the successful Respondent to develop process mapping to assist in the development of the systems.” Does VIHFA expect that proposer will develop the systems after selection? Also, are there multiple systems expected to be development under this contract? If yes, can you please provide information on each system to allow proposal and pricing?

Answer: As stated in the Case Management RFP, the VIHFA expects the respondent to have previous experience working in the CDBG-DR arena, which should allow for the implementation of the process mapping into functional workflows within the proposed Case Management System. The VIHFA expects this activity to take place almost immediately after the contract has been awarded.

114. Question – Section 2.2.3.3: The RFP states, “Verify environmental Tier II review and Historic Preservation documentation has been completed and approved by VIHFA.” Are Tier II reviews expected to be implemented through a separate contract?

Answer: Yes.

115. Question – Section 2.2.4: The RFP states, “Prior to the contract being awarded, VIHFA reserves the right to request that a respondent utilize a different software solution/platform.”? Since productivity is closely tied to the software used, would VIHFA allow selected contractor to re-estimate price and schedule for case management based on the precise capability of VIHFA provided software?

Answer: Yes, this is something that can be revisited once the contract has been awarded, but we anticipate the learning curve should be minimal, especially since the Case Management System will be adhering to the system requirements put forth by the VIHFA. We are also aware that the Graphical User Interface (GUI) may vary slightly from one another, but we anticipate the winning bidder will provide training sessions to all individuals who will be utilizing the Case Management System. All respondents should include a training section within their proposal, highlighting how staff will be trained on utilizing their specific Case Management System.

116. Question – Section 15.0 The RFP states, “Bid Packages must be submitted via mail to:
Virgin Islands Housing Finance Authority
3438 Kronprindsens Gade
GERS Complex – Suite 1
St. Thomas, VI 0802
Attention: Nicole Roberts
RFP 001-2019-DR-STT/STX

Will VIHFA allow us to do them the courtesy of hand-delivering our proposal response to the address listed in the RFP?

Answer: Yes. See the Response to Question #1.

117. Question – Enclosure “E” Please define “Estimated Timing.”

Answer: Currently, the CDBG-DR funds is the only anticipated grant awards envisioned; but the system should have the ability to augment any additional grant award as needed.

122. Question – Section 3.3.vii: Can you provide any details about VIHFA Disaster Recovery website and VIHFA Financial Management Software and Grant Management System? What integration methods are considered acceptable?

Answer: See the responses to Question(s) 72, 102 and 105.

123. Question – Section 3.3: Does the hybrid solution need to have full functionality necessary for an extended outage, or would it be acceptable to include only limited functionality in the hybrid solution?

Answer: At the current moment, the VIHFA is looking into the possibility of implementing satellite uplinks and configuring them as a redundant Wide Area Network link, in the event a catastrophic event affects the territory in the future. Due to not having specific information on this solution, the VIHFA is asking that all respondents present a solution for both full and a partial functionality.

124. Question – Section 3.3: What level of language review would be required for outward-facing screens?

Answer: The vendor should provide full language translations functionality within their Proposed system. As indicated in the RFP, English/ Spanish and recently added French Creole at a minimum should be provided day one.

125. Question – Section 3.3.xv: Would the vendor have responsibility for providing English/Spanish phrase translations?

Answer: Yes, see the response to Question 124.

126. Question – Section 3.3.xxix: Are the outreach capabilities to be incorporated in the system to be limited to contacting program applicants?

Answer: No.

Answer: 100 weeks per Section 1; estimated timing for Section(s) 2 and 3 is as specified.

118. Question – Enclosure “E” Can respondents amend Document E as they see fit? As an example, based on our past experience there are additional labor categories that will be utilized for this type of work that are listed right now in this document.

Answer: Respondent must complete Enclosure Document E as provided in the RFP. Per Section 16.0, I., iii, b., “In addition, for any staffing functions for which specific roles have not been provided in this RFP, the respondent should submit a list, describe, and discuss the need for specific roles to perform certain functions and provide an organizational chart that shows how and by whom these functions will be performed. Cost rates should not yet be provided for these additional roles as part of the cost proposal.”

119. Question – Enclosure “E”: The RFP states, “Travel, Housing, and Per Diem (weekly lump sum)” for 100 weeks. Populating this section seems to be in direct conflict with instructions on page 15, 5.0 which state: “No additional travel expenses, per diem, other direct costs, etc. will be reimbursed under the contract, with the exception of a one-time sum for the start-up of operations...” Given that these types of expenses will not be reimburse, are contractors still required to fill out this portion of Section 3?

Answer: Section 15 in Section 5.0 shall be stricken, and Respondent should submit Enclosure E.

120. Question – Section 4.0 indicates this will be a T&M contract with a cap. Does this mean that once costs hit the cap that work will stop? If this is not the case, please elaborate on how the cap will be implemented.

Answer: VIHFA intends to award a time and materials contract with a cap.

121. Question – Section 3.3.ix: The RFP states, “The chosen system should have the ability to track other grant award and other relevant funding.” What other types of grant awards is it envisioned that they system would support?

127. Question – Section 3.3.v: Is there an electronic signature solution that is preferred for online document execution?

Answer: No.

128. Question – Section 16: The RFP states, "Please provide a budget which includes the anticipated staffing costs per 1,500 applications received and 500 applicants to grant award; and a one-time cost for Start-up of Operations. Your budget should consider all costs necessary to perform the required tasks, including staffing, management, materials, etc." In the budget to be provided, are we to assume that 500 of the 1,500 applications submitted successfully make it to a grant award? Does this mean that we should assume that 1,000 applications do not ultimately make it to grant award?

Answer: Yes.

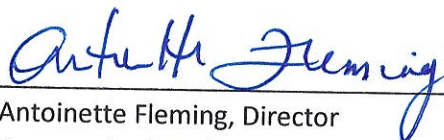
129. Would the data to be imported from the legacy system consist of documents, structural data, or both?

Answer: Upon contractual award, VIHFA MIS will engage in discussion regarding the preferred format for data migration.

130. Question - As a compliment to the program policies and, are program forms, contracts agreements and/or the program application a deliverable of the awarded bidder or are VIHFA drafts of such documents in place/forth coming for use in implementation?

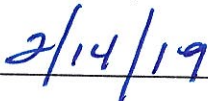
Answer: VIHFA drafts of such documents will be forth coming for use in implementation.

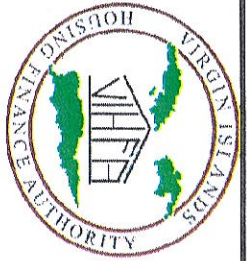
All other requirements and provisions of RFP-001-2019-DR-STT/STX, Housing Case Management Services and System, shall remain in full force and effect.


Antoinette Fleming, Director

Community Development Block Grant-
Disaster Recovery

Date





VIRGIN ISLANDS HOUSING FINANCE AUTHORITY
ATTENDANCE ROOSTER

PRE-PROPOSAL CONFERENCE

RFP NUMBER: RCR-001-2019-DR-SIT/SR

DATE: 2/4/19

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VIRGIN ISLANDS HOUSING FINANCE AUTHORITY
ATTENDANCE ROOSTER

PRE-PROPOSAL CONFERENCE

REF NUMBER: REF-001-2019-DR-ST/STK

DATE: 2/4/19

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VIRGIN ISLANDS HOUSING FINANCE AUTHORITY
ATTENDANCE ROOSTER

PRE-PROPOSAL CONFERENCE

RFP NUMBER: RFP-201-2019-DE-STT/SK

DATE: 2/4/2019

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VIRGIN ISLANDS HOUSING FINANCE AUTHORITY
ATTENDANCE ROOSTER

ON THE PHONE

PRE-PROPOSAL CONFERENCE

RFP NUMBER: RFP 001-2019-DR-STT/STX

DATE: February 4, 2019

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